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MARCH 28, 1988

CableVision

INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT

LOOKING AT THE UAE DEAL

ESPN EYES THE BASEBALL BIGS

HBO WITHDRAWS EXCLUSIVITY OFFER

TELCOS TURNED AWAY AGAIN

STATE REGULATION—IT'S BACK

THE MEDIA WARS: WRESTLING FOR VIEWERS

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It's not news that television ain't what it used to be as the traditional lines blur and as cable and syndication come into their own. The arm wrestling for clout, viewers and advertisers continues a pace with no clear favorite in sight. But some deft analysis can be applied which at least shows where the pressure points are and where breakthroughs may come.

BETWEEN THE LINES

Stats pages: Our style of 'Just the facts, m'am'

In the classic television detective series *Dragnet*, Sgt. Joe Friday would turn that deadpan gaze on a witness and suggest "Just the facts, m'am." And over the years *CableVision* has taken that bit of cautionary advice to heart in the form of our pages of industry statistics.

It takes no small amount of work by our staff to assemble all the bits of data that make up the Top 100 MSO list, the Top 100 systems list, the satellite lineup chart, the pay-per-view supply chart and all the rest. But just as the box score at the end of an account of a baseball game tells exactly what happened and when, we feel these stat pages provide a useful, accessable and uncolored souce of information to our readers. We believe that because many of you have told us so.

But with this issue one of our major stats pages—the film product comparison chart—undergoes radical surgery. Turn to pages 28 and 29 for a look at the new format and then come back for the explanation.

The film product chart has been a complete (or as complete as we could manage) listing of every film in the pay window for the coming month. It told what pay channel the films were airing on, whether the film was exclusive to that channel or not, how many months the film had been in the pay window, the film's MPAA rating and identified the distributor.

In recent times, however, this became a mammoth undertaking as the number of films running on the pays proliferated. Even occupying two pages, a listing of all the movies required type that reminded many of the bottom line on the eye doctor's chart. Another nagging concern was that the chart completely ignored the growing number of original productions and specials running on the pay networks.

We puzzled over this for some time, talked to a great many people and considered all manner of esoteric solutions (one wag suggested keeping the chart as is but providing every reader with a magnifying glass) before an obvious answer occurred to us, ala John Malone's maxim to Keep It Simple, Stupid.

What *CableVision* was trying to provide was a look at what programming of note would be running on the pays next month. That would include movies new to the channel, several specials, original programs, sports events and other highlights. That we have done. And in total adherence to the KISS maxim, we have renamed those pages What's On the Pays. Clever, right?

We don't claim that this is a completed project, but it seems a good beginning. Readers with suggestions for improving the chart—again, ways that would make these stats pages more useful and accessable—will find a ready ear here.

Will readers soon see a chart listing What's On the Basics? We already try to highlight much of that in the Notes column in the Programming section. Sometimes there isn't as much space as we would like to highlight basic programming. And because the program lineups by the basics, with strips and other regularly scheduled shows, lend themselves more to a TV grid format creates other problems. We're also talking about five times as many channels to cover.

But certainly some reader will come up with a useful, workable suggestion for highlighting basic programming (no magnifying glasses, please) and we will follow through. We're quite serious about making every page of this magazine as good as it can be, whether it's a major analytical story on the stock market or the agate type on a stats page.

—Steve Tuttle
Editor and Associate Publisher

CableVision

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ABP BPA

What's on the Pays/April

Cinemax

New Movies

Title	MPAA Rating	Distributor
And Baby Makes Three*	NR	Columbia
9 Deaths of the Ninja	R	Crown
Bad Company	PG	Paramount
Bang the Drum Slowly	PG	Paramount
Black Widow	R	20th Century-Fox
Bon Voyage, Charlie Brown	G	Paramount
Butch and Sundance: The Early Days	PG	20th Century-Fox
Come Back, Little Sheba (B&W)	NR	Paramount
Damnation Alley	PG	20th Century-Fox
Darling Lili	G	Paramount
The Dark Past*	NR	Columbia
Deference of the Realm	PG	Hemdale
The Driver	PG	20th Century-Fox
Drums Along the Mohawk	NR	20th Century-Fox
The Friends of Eddie Coyle	R	Paramount
The Grapes of Wrath (B&W)	NR	20th Century-Fox
Hannie Caulder	R	Paramount
Harlow	NR	Paramount
Hatari!	NR	Paramount
Heaven's Gate	R	MGM/UA
Holiday (B&W)*	NR	Columbia
House of 1,000 Pleasures	R	Group One
House of the Rising Sun	NR	Fox/Lorber
How Green Was My Valley (B&W)	NR	20th Century-Fox
Hunter's Blood	R	Concorde
I Was a Male War Bride	NR	20th Century-Fox
Knock on Wood	NR	Paramount
The Last Day	NR	Paramount
The Legend of Lizzie Borden	NR	Paramount
The Lion	NR	20th Century-Fox
Little Fauss and Big Halsy	R	Paramount
Little Shop of Horrors*	PG13	Warner Bros.
Lucy Gallant	NR	Paramount
Making Mr. Right	PG13	Orion
Mardi Gras	NR	20th Century-Fox
Morgan Stewart's Coming Home*	PG13	Kings Road
The Movie Palaces	NR	Smithsonian
My Darling Clementine (B&W)	NR	20th Century-Fox
My Friend Irma	NR	Paramount
The Naked Prey	NR	Paramount
A Night To Remember (B&W)*	NR	Columbia
No Mercy*	R	Tri-Star
'Only Angels Have Wings' (B&W)	NR	Columbia
Paris When It Sizzles	NR	Paramount
A Place in the Sun (B&W)	NR	Paramount
Playing For Keeps	PG13	Universal
PrettyKill	R	Lorimar-Telepics.
Rosemary's Baby	R	Paramount
Seconds (B&W)	NR	Paramount
Solarbabies*	PG13	MGM/UA
Somebody Loves Me	NR	Paramount
Sorry, Wrong Number (B&W)	NR	Paramount
Steaming*	R	New World
The Stepfather*	R	New Century
The Times of Harvey Milk	NR	Cinecom
Times Square	R	ITC
The Wager of the Three Wives	NR	Pandora
Wisdom	R	20th Century-Fox
Working Girls	NR	Miramax
Young Mr. Lincoln (B&W)	NR	20th Century-Fox

Original Programming/Specials

Cinemax Comedy Experiment: Autobiographies:
The Enigma of Bobby Pitman
Crazy About the Movies: Cary Grant: The Leading Man

Enigma of Bobby Pitman

Highlights

Hoosiers**	PG	Hemdale
Blind Date**	PG13	Tri-Star
Making Mr. Right	PG13	Orion

(**denotes duplicated and exclusive between Home Box Office and Cinemax)

The Disney Channel

New Movies

Around the World in 80 Days	G	Warner Bros.
Brighty of the Grand Canyon	NR	ACAMA Prod.
The Canterville Ghost*	NR	Wonderworks
Cluny Brown	NR	20th Century-Fox
Dot and the Koala*	NR	Cori Films
Escape to Witch Mountain	G	Disney
Heidi's Song*	G	Hannah Barbera
Hoboken Chicken Emergency*	NR	Wonderworks
Hobson's Choice	NR	Televentures
How the West Was Won	G	MGM/UA
Katy*	NR	N/A
The Little Shepard of Kingdom Come	NR	20th Century-Fox
Mystery on Monster Island	NR	20th Century-Fox
Peter-No-Tail in America*	NR	N/A
The Quest*	PG	Miramax
Return of the King*	NR	Lorimar
Samson and Delilah	NR	Paramount
Seven Thieves	NR	20th Century-Fox
Son of Fury	NR	20th Century-Fox
Sunday Dinner With A Soldier	NR	20th Century-Fox
Tail of a Tiger*	NR	Miramax
Thunderhead, Son of Flicka	NR	20th Century-Fox
To Find My Son	NR	Tri-Star
Topper	NR	Hal Roach
Tramp at the Door*	NR	Simcom

Original Programming/Specials

The Animated Haggadah
Disney's Salute to Mom*
The Making of Walt Disney's Captain EO*
'Who's in Charge Here?-A Ronn Lucas Special*
Kaleidoscope Concert: Caren and Craig*
Videopolis*

Mr. Mom

Highlights

The Diary of Anne Frank	NR	20th Century-Fox
Happily Ever After*	NA	NA
Konrad*	NR	Wonderworks
Maricela*	NR	Wonderworks
Mr. Mom	PG	20th Century-Fox
Return of the King*	NR	Lorimar
Son of Flubber*	G	Disney

Home Box Office

New Movies

The Adventures of Tom Sawyer*	NR	Nippon
The Allnighter	PG13	Universal
Blake Edwards' "That's Life"*	PG13	Columbia
Breaking Away	PG	20th Century-Fox
Clockwise*	PG	Thorn-EMI
Codename Wildgeese*	R	New World
Dancing in the Dark*	PG13	New World
Every Time We Say Goodbye*	PG13	Tri-Star
Fire and Ice	PG	Concorde
Hard Traveling*	PG	New World
Heat*	R	New Century
Like Normal People	NR	20th Century-Fox
Nice Girls Don't Explode*	PG	New World
The Return of the Soldier	NR	Brent Walker
Something Wild	R	Orion
Stalag 17	NR	Paramount
Summer Camp Nightmare	PG13	Concorde
Wanted Dead or Alive*	R	New World
Weekend Warriors	R	TMS Picture
The Wraith*	PG13	New Century

Original Programming/Specials

"And the Winner Is..."
Headlines #02
World Championship Boxing:
Fight Night Doubleheader
Dear America Letters Home From Vietnam

Tanner '88: For Real, Part 2

Tanner '88: For Real, Part 2
HBO Comedy Hour: Live From London
Not Necessarily the News of the World

Highlights

Hoosiers*	PG	Hemdale
Blind Date*	PG13	Tri-Star
Police Academy IV Citizens on Patrol*	PG	Warner Bros.

The Movie Channel

New Movies

All the Brothers Were Valiant	NR	MGM/UA
The Allnighter	PG13	Universal
The Appaloosa	NR	Universal
Armed Response	R	Cinetel
The Bible	NR	20th Century-Fox
Charade	NR	Universal
Come Back Little Sheba (B&W)	NR	Paramount
Except For Me and Thee	NR	Lorimar
The Exorcist	R	Warner Bros.
Eye of the Tiger	R	Video Media
The Fifth Missile	NR	TBS
Firewalker*	PG	Cannon
The Fixer	PG	MGM/UA
Grand Prix	NR	MGM/UA
Hardbodies 2	NR	Columbia
Hatari!	NR	Paramount
The Hill (B&W)	NR	MGM/UA
M Station: Hawaii	NR	Universal
Making Mr. Right	PG13	Orion
Mrs. Soffel	PG13	MGM/UA
My Undercover Years	NR	Universal
With the KKK	NA	NA
A Place in the Sun	NR	Paramount
Quiet Cool	R	Universal
Rosemary's Baby	R	Paramount
Speedway	G	MGM/UA
Thi-Pan*	R	DEG
The Warrior and the Sorceress	R	New Horizons

Highlights

Firewalker*	PG	Cannon
Making Mr. Right**	PG	Orion
The Men's Club*	R	Paramount
Some Kind of Wonderful**	PG13	Paramount
Tin Men**	R	Touchstone

(**denotes duplicated and exclusive between Showtime and TMC)

Showtime

New Movies

The Allnighter	PG13	Universal
Catherine Cherie	R	W.P. Donnelly
Cover Girls	NR	Coca-Cola
Diary of Anne Frank	NR	20th Century-Fox
Fairy Tales	R	Goldwyn
FDR:The Last Years	NR	Universal
Go For Broke (B&W)	PG	MGM/UA
Happy Housewives	R	James Phillips
House of 1000 Pleasures	R	Satori
In Search of Historic Jesus	NR	Viacom
The Molly Maguires*	PG	Paramount
Pat and Mike (B&W)	NR	MGM/UA
The People Against O'Hara	NR	MGM/UA
The Red Tent*	G	Paramount
Rumplestilskin*	G	Cannon
The Sheriff and the Satellite Kid	NR	Viacom
Star Spangled Girl*	G	Paramount
Tea and Sympathy	NR	MGM/UA
They Only Kill Their Masters	PG	MGM/UA
Thirteenth Day: The Story of Esther	NR	Universal

Original Programming/Specials

Celebrity Close-Up
New Episodes of It's
Garry Shandling's Show
Showtime Comedy Club Network
Showtime's Classic Rock 'N'
Roll Reunion
Showtime Championship Boxing

Evander Holyfield IBF/WBA Cruiser Weight Champion

Highlights

CodeName: Kyril*	NR	Showtime
Poison*	NR	Showtime
Tin Men*	R	Touchstone
Some Kind of Wonderful*	PG13	Paramount
Street Smart*	R	Cannon
Allan Quatermain and the Lost City of Gold*	PG	Cannon
Wild Thing*	R	Paramount
Making Mr. Right	PG13	Orion

("New Movies" means never before seen on the individual service)
(* denotes exclusive)

There is no single front line in the media wars raging across the television landscape. Looked at one way, it's people meters where television fortunes are being won or lost as viewers are won or lost. From another angle, the feints and sorties by the Big 3 into cable define other strategic battles. And inside the Beltway other, more subtle but no less intense conflicts are occurring in the power corridors of Washington that also are shaping what television will look like in the 1990s.

Metering the TV wars: who's ahead; why?

By Wayne Friedman

This time last year the broadcasting community was bracing for the arrival of the people meters. It seemed the war between the different broadcast windows would come to a head with the introduction of the new measuring service. Cable and syndication executives hoped the people meters would give them parity with the traditional broadcast networks.

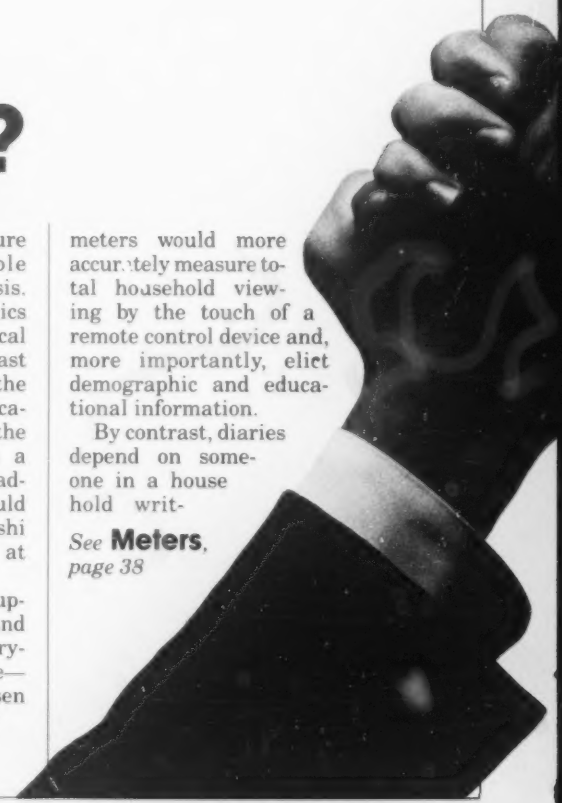
That might indeed happen when all three broadcast outlets are fully on line with people meters come September. So far, early results indicate that the trends that existed before the arrival of people meters are continuing; that is, networks losing shares, kids programs dropping overall in ratings and syndication and cable numbers improving.

Nielsen says people meters are needed because it can't accurately measure network, syndication and cable demographics on a like-to-like basis. Syndication and cable demographics have been measured by 100,000 local diary households while the broadcast networks were counted only on the 2,500 national diary sample (syndicators, to a lesser extent, also used the 2,500 national diary sample). As a result, in comparing the different advertising media, ad agency heads could only judge them as they would sushi and cajun food: It's what suits best at a particular moment.

People meters, in theory, are supposed to put network, syndication and cable windows on equal footing. Everyone will be measured on one sample—around 4,000 households for Nielsen by September, 5,000 households for the new British ratings company, AGB. Not only that but the meters would more accurately measure total household viewing by the touch of a remote control device and, more importantly, elict demographic and educational information.

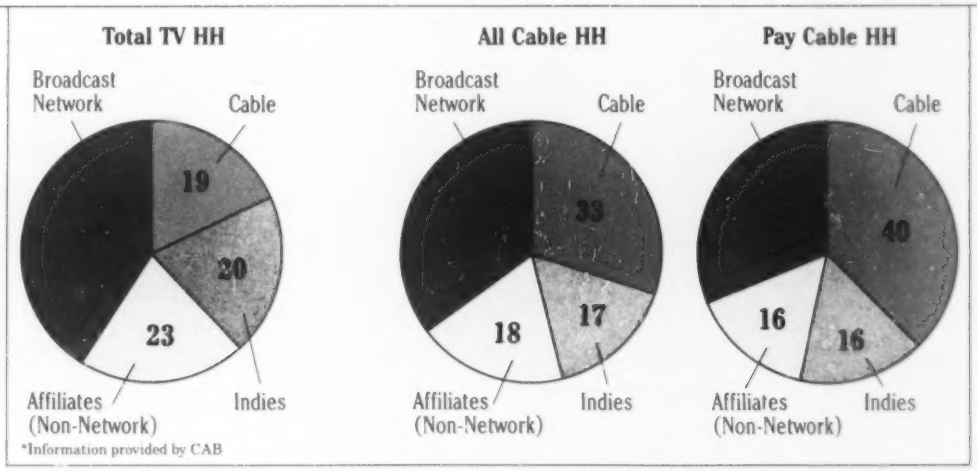
By contrast, diaries depend on someone in a house hold writ-

See **Meters**, *page 38*



Meters, *from page 37*

ing down which shows were viewed. Researchers have long suspected that many households either generally forget to jot down what they viewed or waited until the end of the week to list their programs. So a show like NBC's *The Cosby Show* might at the end of the week get a notation in a diary book just because it's popular, when, in fact, that household may have missed the show.



*Information provided by CAB

The first people meter results seem to suggest that total viewing generally is down from a year ago when the diaries were in force. Prime time, for instance, is down 3 percent for all broadcast media. HUT levels (homes using televisions) also are off.

Almost universally, the biggest losses have been in kids programming. NBC and ABC Saturday ratings are down 34 percent from a year ago, through the first week in March. CBS was spared with only a 12 percent drop. Kids syndicated shows are seeing the same results as the broadcast networks, down around 35 percent to 40 percent. David Bender, vice president of research for USA Network, says that cable network's kids demos similarly are down. Nickelodeon also is off.

Some examples: In November, Nielsen's diary-based Report on Syndicated Programs gives Lorimar's *Thundercats* 104 viewers per hundred viewing households in the 2 to 11 age range vs. 67 in people meters for the same time period. For people meters that works out to less than one kid per household, which "doesn't make sense," says Steve Leblang, vice president of research for Twentieth Century Fox Televi sion. Likewise, Buena Vista's *Duck Tales* posted a 112 in Nielsen's ROSP, and an 80 in people meters; Columbia Television's *Real Ghostbusters* dropped from a 104 in ROSP to a 77 in people meters.

Kids, according to Nielsen, are having difficulty in learning to use the people meter controls. The measuring service is working with psychologists in trying to help educate children to use the people meter properly. In addition, the company is also offering incentives in the form of a catalog where kids can pick out a small toy—one that is not associated with a particular kids show.

Other demographic compositions also have been altered for certain shows. Buena Vista's *Siskel & Ebert* slipped slightly in women 18 to 49 for November from 44 in ROSP to 41 in people meter. Women 25 to 54 also nudged lower, 41 in ROSP, 33 in people meter. For King World's *Oprah Winfrey*, women 18 to 49 sank from 48 in ROSP to 41 in people meter. MCA's *Out of This World*, however, saw gains in women 18 to 49 to 43 in people meter from 36 in ROSP. Men 18 to 49 were also up; 32 in people meter against 26 in ROSP.

What does all this say about who's winning the media wars? Not much, says Mel Conner, senior vice president and senior associate media director for DFS Dorland Worldwide, because most barter arrangements for shows like *Oprah* are multi-year deals, and are already set. In addition, syndicators don't feel these changes will result in significant shifts in advertising budgets.

On the network side, however, prices for next season certainly will be affected by this year's lower people meter numbers. For the current '87 to '88 season, the networks' upfront advertising selling witnessed 15 percent to 20 percent increases in costs per thousand viewers (CPMs) in many dayparts. "Essentially they recognize they were going to deliver totally a lot fewer demographic ratings (because of people meters)," says Conner. "That was really why they kicked the prices up." Next year might be a different story, says Conner. He forecasts single-digit increases for prime time, late night and news, with daytime either flat or lower than this year's upfront prices.

Cable programmers have been fortunate. Unlike broadcast networks, their total household ratings have been generally higher, up 14 percent for all basic networks on a 24-hour basis in the fourth quarter, 35 percent higher in prime time, 8 percent larger in daytime, all against the same period the year before with the old sample. Still, says Cabletelevision Advertising Bureau President Bob Alter, the numbers would have been higher if the people meter's weren't around.

Some preliminary demographic information for the basic cable networks is telling a variety of different stories. Jack Hill, vice president of research for the CAB, reports that some networks are seeing a shift in their key demographics. On a 24-hour basis for November, MTV's 12 to 17 demographic VPVH numbers, for instance, are 32 percent lower in people meters vs. the diaries. Surprisingly, kids 6 to 11 are 29 percent higher in the people meter vs. the diaries for the music network. ESPN has seen a mild drop of 9 percent in men 18 to 49; a larger 18 percent drop in women 18 to 49. Lifetime is up 8 percent in men on a 24-hour basis, but down 3 percent in women. For kids 2 to 11, Nickelodeon is off 15 percent from 8 a.m. to 1 p.m, Saturday, and down 16 percent weekday afternoons 4:30 to 7:30 p.m. Teens

See **Meters**, *page 40*

Meters, *from page 38*

12 to 17, however, are up 11 percent on weekday afternoons. On a 24-hour basis, CNN gained 11 percent in all men's demographics, but it lost 21 percent in all women demos. Women were also down 12 percent in prime time on CNN; men were up 2 percent.

Hill warns, as do most other industry experts, that these preliminary numbers are an initial rough reading. All of these numbers are based on a November sample of 2,000-plus households which doesn't fully recognize cable's entire universe, according to Nielsen. And as Mary Ann Madigan, vice president and network program supervisor for DDB Needham Worldwide, says, because the broadcast network demographics now are completely different compared to the first lot of demographic numbers posted back in April 1986, assessments of cable's first people meter sampling needs to be taken not just with a pinch of salt, but more like a shaker full.

Overall, CAB's Alter says the people meter will be a positive development for cable. But people meter methodically needs to be followed closely in order for it to accurately reflect cable's growth. One of cable's complaints in the past was that networks weren't accurately measured in homes that used VCRs; VCR usage is high among cable subscribers. USA's Bender notes that when Nielsen had problems hooking up the old meter to cable households, it was because of VCRs in those homes. If Nielsen was turned away from a cable household, it wouldn't always replace that home with a cable/VCR household—which would skew ratings differently. Bender says Nielsen still has this problem of hard wiring any measuring technology through a cable/VCR household, but because there are more VCRs in non-cable homes, the differences between cable and broadcast television are narrowing.

For some researchers, the movement from a big to small sample size remains a possible problem. Cable and syndication demos which were measured with 100,000 households will now be determined on 4,000 homes. Syndicators say that is hurting the weekly shows, but not the strips. There is less variation of ratings with strips because they run five times a week, in contrast to the one day weekly shows.

Likewise for cable, Ron Schneier, vice president of research for A&E, says because the sample size is smaller,

See **Meters**, *page 44*

TV's D.C. po

NCTA is defensive, MPAA is sli

By John Wolfe

While the competitive relationship between cable, broadcasting and Hollywood continues to evolve, the relative political strengths of the industries' major trade associations have remained fairly constant, according to a number of lobbyists and congressional insiders. For cable, this is good news; for broadcasters, the picture isn't as pretty.

The National Cable Television Association, now clearly on the defensive, still is considered an efficient and successful lobbying force. The Motion Picture Association of America and its president, Jack Valenti, are seen as flashy and effective.

But the broadcasters—the National Association of Broadcasters in particular—still are viewed as unwieldly, inconsistent and ineffective. And while NAB's professional staff has made gains on Capitol Hill, the association's cumbersome board of directors has rendered the organization unable to advance a consistent public policy agenda, according to lobbyists and Hill staffers.

The political clout of the three industries, always important, becomes even more so as Congress gears up to examine a host of cable-related policy issues ranging from the implementation of the 1984 Cable Act and mandatory access to cable programming to must-carry and copyright. And efforts to permit telephone company entry into cable—considered a key issue for the next Congress—will place a premium on political strength, observers predict.

Indeed, the spectre of telco competition, coupled with the growing cross-

Getting cable friendly

By Virginia Munger Kahn

Nothing more clearly points up the perception of where the cable and broadcast industries are going these days than the drive by NBC to partake of cable's growing bounty and ABC's obvious pleasure with its investment in ESPN. Both companies readily admit it makes eminent sense for them to increase their role in the cable industry given the "mature" state of the network business and the obvious growth prospects of cable.

Industry analysts vary in their opin-

> The nets badly want in
> signs that they are willi
> of the business.
>
> —Analyst John Reidy

ions on the importance of network involvement in cable and clearly CBS is the exception to the trend among the networks in diversifying their businesses. Yet even those analysts who believe it is imperative for the networks to increase their involvement in cable admit it will be increasingly difficult for them to find a vehicle for

Meters, *from page 40*

more errors could occur. That could force cable networks to report only broad-based quarterly numbers instead of monthly figures, he says. It may be necessary to look at dayparts, not individual shows. He says with 4,000 households and a typical 2 cable rating, measurement turns on a slim 35 homes for some cable networks, which could lead to inconsistant numbers. "If people were concerned about the demographics for network TV, they should be real concerned about the demographics for cable," he says.

In the long term, most cable researchers think the switch is warranted. While the diary method is more reliable because of the larger sample size, says USA's Bender, it isn't as valid. He says the numbers coming out of the diaries generally are reported with the same mistakes over and over again. With diaries, Bender says, there is no bounce, no great error fluctuations. But this might happen with people meters.

To eliminate major demographic swings in people meters, Nielsen will change the sample size more frequently than in the past—every two years vs. every five years for diaries and three years for the older meters. Why? Gerry Jaffe, vice president of research projects for NBC, says because "the longer a household stays in the people meter sample, the less likely they are to cooperate, if, in fact, the adults in the household are young. Particularly the men. They just stop pushing the buttons." Still, even a two-year turnover probably isn't enough, says Jaffe, for accurate measurement.

Most cable and syndicators say to counteract any discrepancies the people meter might have in the early going, they will sell their ad time off diary demographics in some cases for the next season or two. DDB Needham's Madigan will, for the most part, use the '87 ro '88 broadcast season diaries for buying cable in the '88-'89 season, with some people meter demographic information as a supplement. But she doesn't foresee any major changes. "I am not anticipating huge variances on the VPVHs," she says, adding that some DDB Needham deals are bought just on the broader household rating data anyway. Madigan says if, however, September demographic people meters numbers are lower than the diaries, then people meter information will become more critical. "It's to my advantage from a negotiating standpoint to back up the truck," says Madigan, with additional people meter data. At the same time, she says, it's a cooperative effort. "I don't want to put the networks out of business either."

Although there is credible demographic information available to ad agencies on the people meter for syndication's adult programs, most of the syndication community has convinced Madison Avenue to use the '87 to '88 diary information to buy this coming '88-'89 season for the troubled kids shows. Because animated and other children's programs are in such disarray, Bruce Rosenblum, senior vice president of research for Lorimar Telepictures, says syndicators have convinced advertisers to read off the diaries for another year—the '89-'90 season—. He says all but one or two agencies are going along.

No matter what sort of demographics will arise come September this year, the same equation will generally exist for advertisers in divvying up their national broadcast budgets. First comes the broadcast network buy, which is usually secured in late spring/early summer, then syndication a few weeks after that, and finally cable. "We are number three on the hit list," says John Silvestri, senior vice president of advertising sales for USA Network. The difference with cable now than in previous years is that cable has a specific piece of a television advertiser's national budget. Says Tom Winner, senior vice president and director of national broadcast for William Esty Co., "We are a lot closer to cable being more than a supplemental buy. There is not one national broadcast buy we make, without considering cable. And in most cases, we end up taking a portion of our national dollars on putting it into cable."

People meters will play a role in helping to measure the quality of programming among the broadcast windows. In the long run that advantage might appear to aid syndicators/independent stations and cable, possibly hurting the networks. Even without people meters, industry followers say, network shares already were slipping, as were most kids programs. Still, NBC's Jaffe voices a common network view of the measuring system: "The diary was a less-than-perfect measure, but a damn good measure for us. And the people meter numbers are not a particularly good measure, not for us, and not for anybody." ■

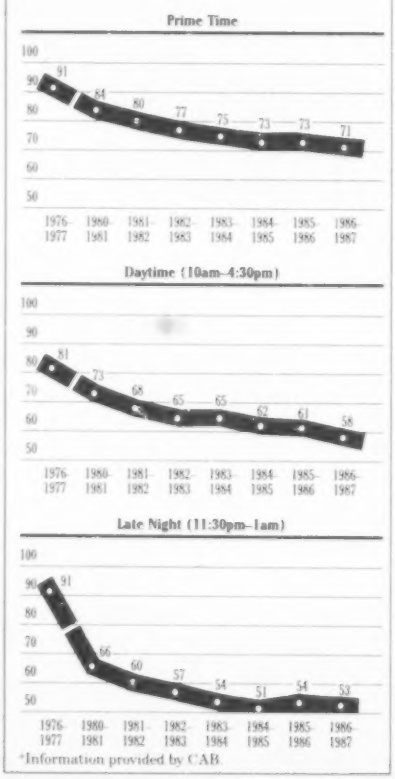
How People Meters See The Networks

(comparing the '87-'88 season with the season before, through March 6)

	'87-'88	'86-'87	Change
Saturdays (Kids 2-11)			
CBS	8.3	9.4	-12%
NBC	8.2	12.4	-34%
ABC	6.0	9.1	-34%
Daytime (Women 18-49)			
CBS	3.6	4.1	-12%
NBC	3.1	3.3	-6%
ABC	5.2	5.2	unchanged
Prime (Men 18-49)			
CBS	8.6	10.9	-21%
NBC	11.4	13.3	-14%
ABC	9.7	10.3	-6%
Prime (Women 18-49)			
CBS	6.5	8.1	-20%
NBC	8.9	10.7	-17%
ABC	8.8	8.9	-1%

'87-'88 numbers are Nielsen People Meter

Broadcast Network Shares Continue To Erode



*Information provided by CAB.

Subscriber Count

Satellite national services

Basic services	Affiliates	Subscribers
ACTS Satellite Network	351	6,300,000
Alternate View Network	243	3,000,000
America's Value Network	212	6,000,000
Arts & Entertainment (A&E)	2,500	30,000,000
Black Entertainment Television (BET)	1,000	18,000,000
Cable News Network (CNN)	11,770	44,300,000
Cable Value Network	1500	18,400,000
CBN Cable Network	7,919	38,981,000
C-SPAN	2,750	33,000,000
C-SPAN II	475	12,500,000
Country Music Television	568	6,800,000
The Discovery Channel	2,700	27,494,000
ESPN	18,936	46,100,000
Eternal Word Television Network (EWTN)	427	9,000,000
The Fashion Channel	600	8,700,000
Financial News Network (FNN)	1,770	27,300,000
FNN/Score	1,150	19,800,000
FNN/TelShop	850	11,000,000
GalaVision	300	1,000,000
Headline News	3,725	30,124,000
Hit Video USA	170	2,164,000
Home Shopping Network	1,270	14,636,087
Home Shopping Network 2	295	5,112,658
The Inspirational Network	1,050	10,500,000
International Television Network	56	7,868,900
The Learning Channel	930	11,100,000
Liberty Broadcasting Network	42	1,121,718
Lifetime	3,600	37,200,000
Mind Extension University	63	1,300,000
The Motivation Network	13	200,000
Movietime	60	4,000,000
Music Television (MTV)	4,590	39,400,000
The Nashville Network	6,954	38,994,000
National Jewish Television (NJTV)	295	6,800,000
NewJaz-TV	200	300,000
Nick At Night	3,175	32,500,000
Nickelodeon	5,670	37,900,000
The Nostalgia Channel	185	2,500,000
QVC Network	810	11,200,000
Shop Television Network	60	3,000,000
Silent Network	380	10,000,000
Tempo Television	700	14,500,000
The Travel Channel	220	7,000,000
Trinity Broadcasting Network	523	7,037,000
USA Network	10,100	42,500,000
Video Hits One (VH-1)	1,715	24,700,000
Video Shopping Mall	600	14,000,000
The Weather Channel	3,100	31,600,000
WGN-TV	10,809	23,888,216
WOR-TV	2,293	9,657,482
WPIX-TV	617	8,875,212
WTBS-TV	12,664	43,414,000

Pay services		
American Exxtasy	35	25,000
American Movie Classics	1,400	10,000,000
Bravo	350	1,300,000
Cinemax	3,650	5,100,000
The Disney Channel	4,300	3,810,000
Festival	N/A	N/A
Home Box Office (HBO)	6,700	15,900,000
The Movie Channel	3,250	2,600,000
The Playboy Channel	600	520,000
Showtime	3,200	5,700,000

Audio services		
Cable Radio Network	40	1,310,000
KKGO Super Jazz	16	131,832
Moody Bible Institute	62	935,528
Satellite Radio Network	237	483,000
Seeburg Lifestyle Music	142	2,576,838
Seeburg Lifestyle Adult Contemporary	26	854,390
Tempo Sound	107	1,250,000
WFMT Chicago	177	1,233,355

Text services		
AP News Cable	185	2,500,000
AP Business Plus	54	1,400,000
AP News Plus	75	2,100,000
Cable SportsTracker	40	875,328
DBC/MarketWatch	433	8,400,000
Electronic Program Guide (EPG)	321	6,494,395
EPG Jr.	161	152,178
EPG Prevue	N/A	N/A
Genesis Cable Storytime	39	1,550,000
Reuters News View	127	2,437,000
TV Decisions	177	7,000,000
X*Press Executive	350	4,000,000
X*Press Exchange	350	4,000,000

Non-satellite-fed national services

Bicycled services	Affiliates	Subscribers
Cable Video Entertainment	195	15,000,000
Fuji Network	3	12,000
Nippon Golden Network	3	13,000
Telaction	N/A	N/A
Vector Consumer News	5	200,000
Vector Consumer Shopping Guide	9	325,000

Regional entertainment services

Basic services	Affiliates	Subscribers
Atlanta Interfaith	7	160,000
Bay Area Religious Channel (BARC)	6	113,000
Buffalo Sabres Hockey	6	455,000
Cable TV Network of New Jersey	35	1,364,836
The Ecumenical Channel	9	170,000
KTVT	415	3,502,352
Life Newsvision	35	50,000
Madison Square Garden	105	2,200,000
Meadows Racing Network	14	600,000
News 12 Long Island	7	500,000
Prime Cable	8	344,350
Prime Ticket	37	2,250,000
SportsVision (Chicago)	48	1,200,000

Pay services		
Home Sports Entertainment Houston Dallas	180	650,000
Home Team Sports	114	719,000
New England Sports Network	160	217,884
PRISM-Philadelphia	87	422,329
Pro-Am Sports	140	301,000
SportsChannel (Florida)	2	45,000
SportsChannel (New England)	147	800,000
SportsChannel (New York)	92	1,000,000
Z Channel	17	80,000

Note: Figures for affiliate and subscriber counts will be updated quarterly unless information is provided by the service. Send information to: *CableVision*, Attention: Candace Drake, Cable Stats, 432 Park Avenue South, Suite 1109, New York, NY 10016.
N/A denotes information not available.
TBA denotes to be announced.

Announced services

Satellite-fed services	Expected launch
ATV/Advertising Television	2nd Quarter 1988
Family Guide Network	1st Quarter 1988
International Cablecasting's CD 8-Digital Music Network	7/88
Kids Information Network	3/88
The Landscape Channel	4th Quarter 1988
Laugh TV	2nd Quarter 1988
Main Street	4th Quarter 1988
Telamerica Broadcast Network	2nd Quarter 1988
Teleworld Network Television	5/88
TNT	10/88
Visions Interface Satellite Network	7/88
Wingtips	2nd Quarter 1988
You TV	3/88